
Quick Reference Guide:

AIM Tips & Tricks

This guide explains how to avoid common errors when entering and maintaining data in the AIM system and reporting data to the State.

Topics covered in this Quick Reference Guide include:

- *Searching for students in AIM*
- *Creating and modifying enrollments*
- *Records transfers*
- *Creating households*
- *File uploads*
- *Special Ed and LEP*
- *Routine data checks*



This guide gives Users some tips about how to maintain AIM data quality and ensure efficient and timely reporting to the State.



Before beginning, consider the following:

1. Why can't I find a student in AIM?

- Use the Search tab (not the Student Locator) to search for students currently enrolled in your district. Errors in spelling or gender can cause problems in searching for a student. *page 2*

2. What are the best practices for creating or changing a student enrollment?

- Use the Student Locator to create a student enrollment. *page 4*

3. How do I request records from another district in Montana?

- Use the Process Inbox and the Records Transfer tab to request and release student records. *page 6*

4. How do I create a household?

- Use the Census Wizard to assemble a household with student information, an address, and at least one guardian. *page 7*

5. What is the best way to upload a file into AIM?

- Format files correctly to upload demographics, enrollments, program participation, and other data into AIM. *page 8*

6. How do I resolve problems with Special Ed or LEP data?

- Avoid or resolve common errors occur when entering team members for a special education student or when designating a student as LEP. *page 9*

7. What routine procedures should I perform to maintain the quality of my data?

- Run these data updates and checks on a daily or weekly basis to keep student data accurate and up-to-date. *page 10*

Searching in AIM:

- For quick results, enter just the first few characters of the last name. It is not necessary to enter the student's entire name.
 - This is useful if the full spelling of a name is unknown.
 - To search on a first name, enter a comma and then the first name (e.g., ",John").
- Use the Search tab (under Search, search for Students, enter last name) to find students who are currently enrolled in your district. Use the Student Locator to search statewide for students who may be currently or previously enrolled in other districts.
- The Search tab will find students with an enrollment in the year and school selected at the top of the screen.
 - Set the Year to *All Years* to search enrollments for all years.
 - Set the School to *All Schools* to search in all schools of the district.
- Search for "All People" on the Search tab to find anyone who has ever been entered in the system, including staff members and parents. Search for "All People" to search in all years and all calendars, regardless of what is selected at the top of the screen.
- If a student is not found when searching for "Student", try searching under "All People." If an enrollment was entered incorrectly, the search for a student may not work but the student will be found under All People.

The screenshot shows the AIM search interface. At the top are tabs for 'Index', 'Search', and 'Help'. The 'Search' tab is active. Below the tabs is a dropdown menu with 'Student' selected. To the right of the dropdown is a green 'Go' button. Below the dropdown is a text input field containing 'ches'. Below the input field is a link for 'Advanced Search'. At the bottom, it says 'Search Results: 1' and lists one result: '05 Chesney, Kenneth #1234 [05/09/2004]'.

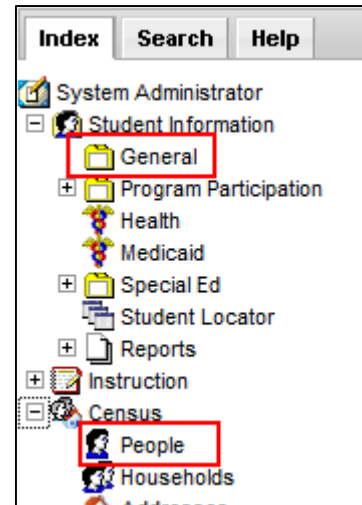
The screenshot shows the AIM search interface. At the top are tabs for 'Index', 'Search', and 'Help'. The 'Search' tab is active. Below the tabs is a dropdown menu with 'All People' selected. To the right of the dropdown is a green 'Go' button. Below the dropdown is a text input field containing 'ches'. Below the input field is a link for 'Advanced Search'. At the bottom, it says 'Search Results: 2' and lists two results: 'Chesney, Kenneth #1234 [05/09/2004]' and 'Chesney, Kenny'.

An "All People" search looks at all year and all calendars. This will find individuals that a "Student" search may not.

For more information see the [New User Guide](#).

Student Information vs. Census:

- **Index/Student Information/General** will pull up a set of tabs related to a student's activities at your school. Use this for looking at enrollment data.
- **Index/Census/People** will pull up a set of tabs showing demographic information about a person. Use this for updating a student's personal data.
- **NOTE**-To update a student's name, gender, or birthdate, use **Index/Census/People**. When a student's name changes, create a new identity on the Identities tab. The identity with the most recent effective date is the one that will appear as the student's on-screen name. If a student has multiple identities, find the student by searching on any of the identities.



Enrollment vs. Enrollment History:

A common error when adding an enrollment record is to click **New Enrollment History** instead of **New (Enrollment)**. These are very different and the error will cause the enrollment to be incorrectly posted and will not be reported correctly to the state. The student will not appear in a Search of *Students*.

- An **Enrollment** is a record of the student's enrollment in the district, either currently or in a previous year. To add an Enrollment record, click **New**. In the Enrollment Editor screen, an enrollment record appears with a clipboard with a pencil on it.
- An **Enrollment History** is a record of a student's enrollments in *other* districts. To add an Enrollment History record, click **New Enrollment History**. The symbol for an Enrollment History record is a clipboard with little lines on it. A common mistake is clicking the New Enrollment History button instead of New when creating an enrollment.

Chesney, Kenneth
Grade: 05 #1234 DOB: 05/09/2004 Gender: M

Summary **Enrollments** Schedule Attendance Flags Grades Tra

Print Enrollment History **New** New Enrollment History

Enrollment Editor

Edit	Grade	Type	Calendar	Start Date	End Date
	05	P	14-15 Cascade School	08/27/2014	
Start Status: 02 Continued enrollment same school, no Interruption End Status:					
	04	P	Cascade School 13-14	08/29/2013	05/30/2014
Start Status: 04 Transfer from public school in district or state End Status: 100 End of year, returning to same school next year					
	03	P	12-13 Cascade School	11/04/2012	06/07/2013
Start Status: 06 Transfer from an out of state school End Status: 100 End of year, returning to same school next year					
	05	P	sample history record	08/25/2013	
Start Status: 03 Re-entry to the same school after withdrawal Attended school in North Dakota for several weeks during 2013 but returned when parent returned to previous job. End Status:					

Chesney, Kenneth
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Entering new enrollments:

- Always select the correct year and school at the top of the screen before beginning the enrollment process. Selecting the year and school in mid-process which could result in a loss of data.
- Always use the Student Locator to search for a student who is transferring in to the district from another district in Montana or from out of state. The Student Locator will find any existing record for the student and will start the process of enrolling that student in the school. The Student Locator requires First Name, Last Name, and Gender.
 - The Student Locator requires entry of the full name, spelled exactly as it was spelled in the student's previous district, otherwise it will not find the record. (E.g., If the student was enrolled as Tom Brady in his previous district and you search for Thomas Brady, the locator will not find him. Try all variations of the student's name.
 - Occasionally, a district enters the wrong gender. If the locator does not find the student, try switching the gender in case a mistake was made in the previous district.
- Manually enter a new enrollment for a returning student, and do not use the Student Locator. Navigate to the student's enrollment tab and click New. Enter the new enrollment for the student.
- Start Date--The Start Date of a student's enrollment is the first day he or she attends class in the district, not the date the enrollment is created and not the date that records are received.
- End Date--The End Date of a student's enrollment is the last date the student attends class in the district, not the date the district is notified he or she is leaving and not the date on which records are released.

For more information see the [New User Guide](#).

Service Types:

- The Service Type for most students will be P: Primary enrollment.
- Use S: Partial if a student is enrolled primarily in another school (public, private, or home school) and is taking additional classes in your school.
- Use N: Special Ed Services for a student who is receiving only Special Ed services, such as speech, and is not taking any regular classes.

100: End of year, returning to same school next year
105: Change in grade level during regular school year
110: Promoted to another school in the same district
120: Transfer to a public school in the same district
130: Transfer to public sch under NCLB sch choice
140: Transfer to public sch in another district in MT
150: Transfer to a MT state-funded school
160: Transfer to a private school in the state
170: Transfer to a home school in the state
180: Transfer to a school out of state
190: Transfer out of the country
210: Medical care or treatment, eligible to return
220: Enrolled in a foreign exchange program
230: Enrolled in an early admissions college program
240: Withdrawn, under age for compulsory school att
250: Expelled, eligible to return
260: Unknown (grades PK-6)
295: Dropped out, subsequent re-enrollment
300: Withdrew for personal or academic reasons
310: Exceeded age requirement set by district policy
320: Removed or Expelled, without option to return
330: Withdrew to enroll in non-diploma program
340: Unknown
400: Graduated

End Status codes:

- When a student who previously dropped out returns, use End Status code 295. This code is only used retroactively. That is, if a student was marked with one of the dropout codes for the end of his or her last enrollment and unexpectedly comes back to school within the same school year or prior to the next fall count date, go back to the last enrollment and change the dropout code to a 295.
 - If this is not done the student will count against the district as a dropout.

Grade Level Changes:

- If a student is promoted to a higher grade (or demoted to a lower grade) during the course of a school year, always end the student's current enrollment with an **End Code** of 105: *Change in grade level during regular school year* and create a new enrollment with the new grade and a **Start Code** of 02: *Continued enrollment, no interruption*.
 - Do not change the grade level in the student's current enrollment record. Doing so will erase any record of the grade in which the student began the year, and this can cause problems for ANB calculations later on.

For more information see the [Entry Scenarios](#) and [Exit Scenarios](#) reference guides.

Records transfers:

- When a student transfers from another district in Montana, the AIM administrator can request an electronic transfer of records from the student's previous district. The Student Locator will automatically display the Student Records Transfer page after creating an enrollment. Click on Submit Request to initiate the request.
- When a student who was previously enrolled in your district returns, the Student Locator will not automatically take you to the Records Transfer page. In this case, pull up the student's general information and go to the Records Transfer tab. Click New State Transfer Request, then Submit Request.
 - NOTE-The records transfer tool will only request records from a student's last district of enrollment, not from every district the student has ever been enrolled in.
- When the previous district has released the student's records, a message which reads "Transfer Released" will appear in the Process Inbox. Click that link to open Student Records Transfer page. On the lower right, under Data Imports, click on one of the available records and then click either Save or Next to download the record. It is especially important to download any Special Ed or LEP records that have transferred.
 - NOTE: Only a locked IEP will transfer electronically. Be sure all IEPs are locked before releasing records.
- When another Montana district sends a request for student records a message will appear in the Process Inbox which reads "Request for you to Release:" Click on this message and then choose to release, reject, or ignore the request.

Bodett, Thomas
Grade: 07 DOB: 05/05/2002 Gender: M

Summary Enrollments Schedule Attendance Flags Grades Transcript
Credit Summary Assessment Behavior Graduation AdHoc Letters **Records Transfer**

+ New State Transfer Request

Request Date	Name	Status	Requesting District	Releasing District
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Records Transfer Bodett, Thomas #
Use this tool to request the release of a transfer student's records. The following information will be sent to the student's former district and they will be given the opportunity to release their records. Only an exact student match can yield a release, so it is a good idea to call the district to confirm this student was enrolled there and to let them know to expect a release request.

Student: Enrollment Type: Primary
Last Name: Bodett First Name: Thomas Middle Name:
Gender: M Birthdate: 05/05/2002 SSN:
Grade: 07 School: 14-15 Cascade 7-8 Start Date: 01/20/2015

Requesting District & User
District: 0280 Cascade Public Schools Name: System Administrator Username: support
Request Date: 10/29/2014 Work Phone: Email:
Comments:

Submit Request

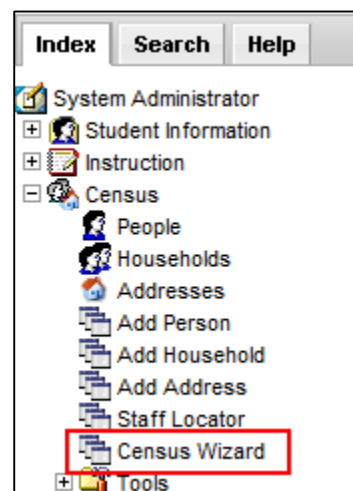
[Transfer Released: Knievel, Evel 419339261](#)

[Request for you to release: Knievel, Evel 419339261](#)

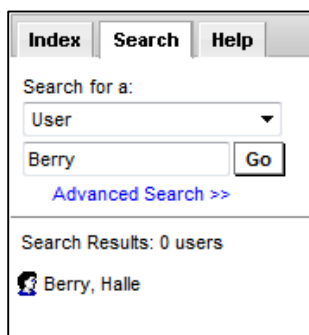
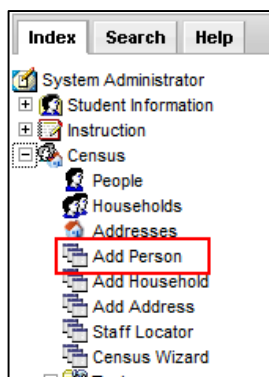
For more information see the [Records Transfer](#) reference guide.

Creating a Household:

- You need three essential ingredients to create a household: student, at least one guardian, and an address.
- The student should already be enrolled in the system. Under the Index tab, click Census/Add Person to create the guardian(s). Use Census/Add Address to create the address.
- When all of the above have been entered, use Index/Census/Census Wizard to link them together into a household. Search for the relevant people and address and click on each to add it to the Household box. Move to Step 2. Enter a telephone number and household start dates. Move to Step 3. Pick the set of names under Relationship to (student) and choose the correct relationships. The Guardian and Mailing boxes should be checked for each guardian. If a person in the household is not a guardian, do not check these boxes.



For more information see the [Creating Households](#) reference guide.



For more information see the [Creating & Modifying Users](#) reference guide.

Adding new staff:

- To add a new staff member go to Index/Census/Add Person. After adding the person, add the correct information on the District Employment and District Assignment tabs. It is important to have the correct role boxes checked on the District Assignment record, especially for SPED staff. The staff member must have the Special Ed box checked to be added as a team member for a student.
- NOTE—If a staff member will be working with students at more than one school in the district, enter a separate district assignment for the staff member for each school.
- To create an AIM user account for a staff member, search for the person under User and then select a username, password, and user group rights. It is recommended that only the primary AIM administrator and an AIM backup person have full administrative rights in the AIM system. Special education staff, counsellors, and teachers should not be given full tool rights.
- For TEAMS reporting purposes, a teacher's State Staff ID in AIM should be set to their SEID (Folio) ID number.

File uploads:

- If using a local SIS, create file uploads for demographics and enrollments and upload these files into AIM.
- Always upload the Demographics file first and the Enrollments file second. Any other file uploads—program data, attendance, LEP etc.—come after these first two uploads.
- Go to MT State Reporting/MT Data Upload to start the process. Select the file type, choose Validate and Test, and browse for the correct file.
 - Always validate and test the file before doing the actual upload. This will help prevent the accidental uploading of incorrect data.
 - Always review your results after uploading a file. The results file will alert you to any errors which occurred in the upload.
- Always choose Load Partial File when uploading a file. Do not use the Load Complete File option, as this can result in an accidental deletion of data in AIM.
- If using the blank Excel template to upload a file, pay attention to the required field characteristics, such as numerical field length, four digits for district and school code, two digits for grade code, etc. The data in Excel may need to be “zero padded” (i.e., formatted with necessary zeroes in front of the number) before saving the file.
- An Excel file must be saved as a .txt file in order to be uploaded into AIM. This conversion will enter a series of blank tabs after the header row. Delete these from behind the last character of the header row before saving and uploading.

This an example of the enrollments Excel template. The template contains information on how to correctly format all fields.

DELETE rows 1, 2, and 3 prior to saving as a text(tab delimited) file - enter the Header Row into the text file.										
Field 1	Field 2	Field 3	Field 4	Field 5	Field 6	Field 7	Field 8	Field 9	Field 10	Field 11
Record Type (EN)	District Number	School Number	Calendar Number	Student's State ID	Student's Local ID	Last Name	First Name	Service Type (P,S,N)	Start Date (MM/DD/YYYY)	Start Status

For blank file templates see [OPI File Specifications](#).

Tips for Special Ed:

For AIM Administrators:

- To make sure the student shows up in a staff member's caseload, list the staff member as a student's team member.
- To make a staff member selectable as a team member for a student, check the Special Ed box on the staff member's district assignment.
- Lock the IEP in order to ensure a student is considered to be Special Ed for state reporting purposes. Simply marking a student as Special Ed on the enrollment tab is not sufficient.

For Special Ed Staff:

- When creating the Evaluation Report, uncheck the "not eligible" box and mark at least one disability. Once the report is signed by a guardian, locked it in AIM.
- When creating an IEP, report the total instructional minutes per day in the State Reported Data editor. After the IEP meeting and when the IEP is signed by a guardian, lock the IEP and all amendments.
- Instead of changing dates on the first screen of the Amendment Options, add an Amendment Reason and click Save. After all changes are made, selecting the Review Amendments icon on the upper right of the screen to change the Start Date. This applies the new date to all changes.
- If a person is no longer a case manager or other team member, end date the person on the Team Members tab.

For additional questions contact Mary Graff at 444-0685.

The screenshot shows the 'Employment Assignment Information' form. It includes fields for School (Cascade School), Department, Start Date (08/01/2013), End Date, Title, Type, FTE of Assignment, and Assignment Code. Below these are several checkboxes for roles: Teacher, Special Ed (highlighted with a red box), Program, Behavior Admin, Health, Advisor, Supervisor, Counselor, Foodservice, Exclude Behavior Referral, Self Service Approver, and FRAM Processor.

Tips for LEP:

- The LEP Tool requires that you first enter the student's Home Primary Language and Language of Impact on the Demographics tab. Then you can mark the student as LEP.

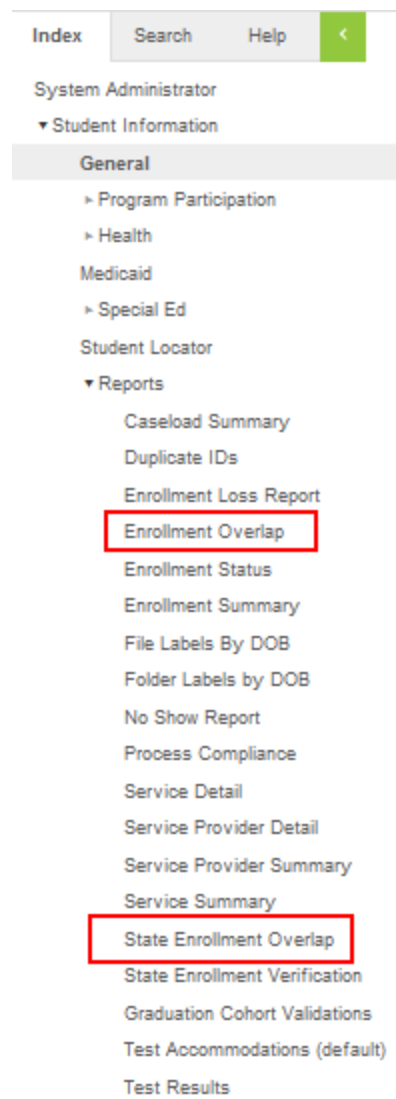
The screenshot shows the 'Demographics' tab form. It includes fields for Date Entered US, Date Entered US School, Date Entered State School, Home Primary Language (highlighted with a red box), Language of Impact (highlighted with a red box), and Nickname.

For more information see the [LEP Tool Guide](#).

Routine Data Checks:

Districts should run certain data processes and checks on a regular basis. For instance:

- Update enrollments in AIM within 24 hours when a student transfers into or out of the district or undergoes a change in grade level or service type.
- If you are the AIM administrator for the district (or school), check the Process Inbox every day to handle transfer requests from other districts.
- Run enrollment overlap reports on a weekly basis and anytime an enrollment file is uploaded into AIM. The Enrollment Overlap and State Enrollment Overlap reports are found under Index/Student Information/Reports.
- If a student appears on the State Enrollment Overlap report, the error is likely due to an incorrect Start Date or End Date at the previous or current district.
- If a student has not attended school for more than two weeks, the student may have moved to another district without giving notice. Use the State Enrollment Overlap Report to verify whether or not the student has been enrolled elsewhere.



Graduation Tab:

- When a student graduates as a high school senior, enter diploma information on the General Graduation Information section of the Graduation tab. Enter the Diploma Date, Diploma Type, and Diploma Period. The Date First Entered 9th Grade is calculated automatically. The other fields can be disregarded.
 - Do not enter graduation information for “graduating” 6th or 8th graders, even if the district issues a certificate as a diploma.

A screenshot of the 'State Graduation Record' form in the AIM system. The form is titled 'State Graduation Record' and includes a section for 'General Graduation Information'. Fields include 'Diploma Date' (with a calendar icon), 'Diploma Type' (a dropdown menu), 'Diploma Period' (a dropdown menu), 'Date First Entered the 9th Grade' (with a calendar icon and the value 08/23/2012), 'NGA Cohort End Year' (a dropdown menu with the value 2016), 'NCLB Cohort End Year' (a text field with the value 2016), 'Post Grad Location' (a dropdown menu), and 'Post Grad Plans' (a dropdown menu). At the bottom, there is a 'State Reporting Graduation Fields' section with a 'Cohort Grad Year' field.

For more information see the [Graduate Cohort and Dropout Verification](#) guide.

INDEX OF AIM REFERENCE GUIDES

For searching for students and setting up new enrollments: [New User Guide](#)

For detailed scenarios on how to enter and exit students and which codes should be used: [Entry Scenarios](#) and [Exit Scenarios](#)

For creating households: [Creating Households](#)

For adding new staff members and AIM users: [Creating & Modifying Users](#)

For reporting students in Job Corps or Montana Youth Challenge: [MT Programs - Job Corp, Youth Challenge, and MTDA](#)

For setting up LEP students: [LEP Tool Guide](#)

For setting up FRAM eligibilities: [FRAM Direct Entry and File Upload](#)

For reporting graduates and dropouts: [Graduate Cohort and Dropout Verification](#)

Link to ePass site: [ePass Montana](#)

Link to OPI Confidentiality and Security Policies (video): [OPI Security Policies](#)

**For further assistance, contact the AIM Help Desk at
opiaimhelp@mt.gov or 1-888-424-6681.**

OTHER OPI STAFF:

If you have questions regarding a specific program these individuals will be best suited to help you:

PROGRAM	SPECIALIST	PHONE	EMAIL
CTE Data	Diana Fiedler	444-9019	dfiedler@mt.gov
Smarter Balanced Assessment	Ashley Makowski	444-3511	amakowski@mt.gov
21 st Century Program	Amanda Domino	444-1964	adomino@mt.gov
TEAMS, School Staffing	Danielle Murphy	444-1625	dmurphy@mt.gov
Title I	Jack O'Connor	444-3083	joconnor2@mt.gov
Homeless and Title I D Neglected and Delinquent	Heather Denny	444-2036	hdenny@mt.gov
LEP (Limited English Proficient)	Eric Meredith	444-3642	emeredith@mt.gov